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Chesebrough shakeup

O&M, McCann winners

By PAT SLOAN

Chesebrough-Pond's has completed a worldwide agency review that will consolidate nearly all its domestic brands at Ogilvy & Mather, a key agency of Unilever. The U.K.-Dutch consumer products giant last week made final its acquisition of Greenwich, Conn.-based Chesebrough.

The reassignments, valued around $70 million, transfer about $55 million in business to O&M, while McCann-Erickson, another major Unilever agency, picks up the Vaseline line, which receives about $14 million in support. Waring & LaRosa retains Ragu and Adolph's food products, valued at approximately $19 million

Also, McCann and Ogilvy came away the big winners in a separate international review, begun before Chesebrough was sold. At the time, a Chesebrough executive said the review would not affect domestic assignments (AA, Sept. 1).

Vaseline, one of the key brands involved in the $50 million international review, will be assigned to McCann, a company spokesman said. Pond's, another key brand, will go to O&M. Pond's is now handled by O&M in several international markets.

The losing agencies on the domestic side are Waring & LaRosa, which says goodbye to Aziza makeup and Cutex nailcare and makeup; William Esty Co., agency for fragrances and only last month named to handle the new Elizabeth Taylor's Passion fragrance; and Lowe Marschalk, the Q-tip agency. These brands shift to Ogilvy.

In addition to fragrances, Esty loses Vaseline to McCann and Pond's creams and lotions to O&M.

W&L will lose more than $13 million in billings, and Esty stands to lose more than $20 million. Q-tips, at Lowe Marschalk, receives about $8 million in ad spending.

O&M's new assignments, according to the latest full year estimates, break down as follows: $17 million in fragrance billings, $13 million from Cutex and Aziza, $6.5 million from Pond's, $8 million from Cutex, $250,000 from Erno Laslo skin care products and $9 million from haircare products.

Chesebrough divisional executives apparently were stunned by word of the re-

(Continued on Page 80)

Secondary role spurred O'Donnell

By STEWART ALTER

New York—The issues that triggered Joseph O'Donnell's sudden ouster as chairman-ceo of J. Walter Thompson Co. involved his frustrations with the agency's secondary role to the parent JWT Group.

But the ammunitior he attempted to use against his boss, Don Johnston, chairman-ceo of JWT Group, backfired.

As more becomes known about the environment at JWT Group in the period before the confrontation between Mr. Johnston and Mr. O'Donnell, the picture emerges of an agency head who felt he could not control his agency's destiny as long as the parent actually was running the show.

"Clearly one of his top motivations was to control the destiny of the advertising agency," one source said of Mr. O'Donnell. He was said to have felt that although Thompson accounted for the bulk of JWT Group's revenues, Thompson could not exert the influence it needed in the Group setup. Mr. O'Donnell also was concerned lest the agency suffer from the rub-off effect of problems that were really the parent's.

New information about the events that led to Mr. O'Donnell's fateful Jan. 23 showdown with Mr. Johnston contains glimpses of issues that apparently were used to justify a demand that Mr. Johnston surrender the ceo post to Mr. O'Donnell and take the lesser title

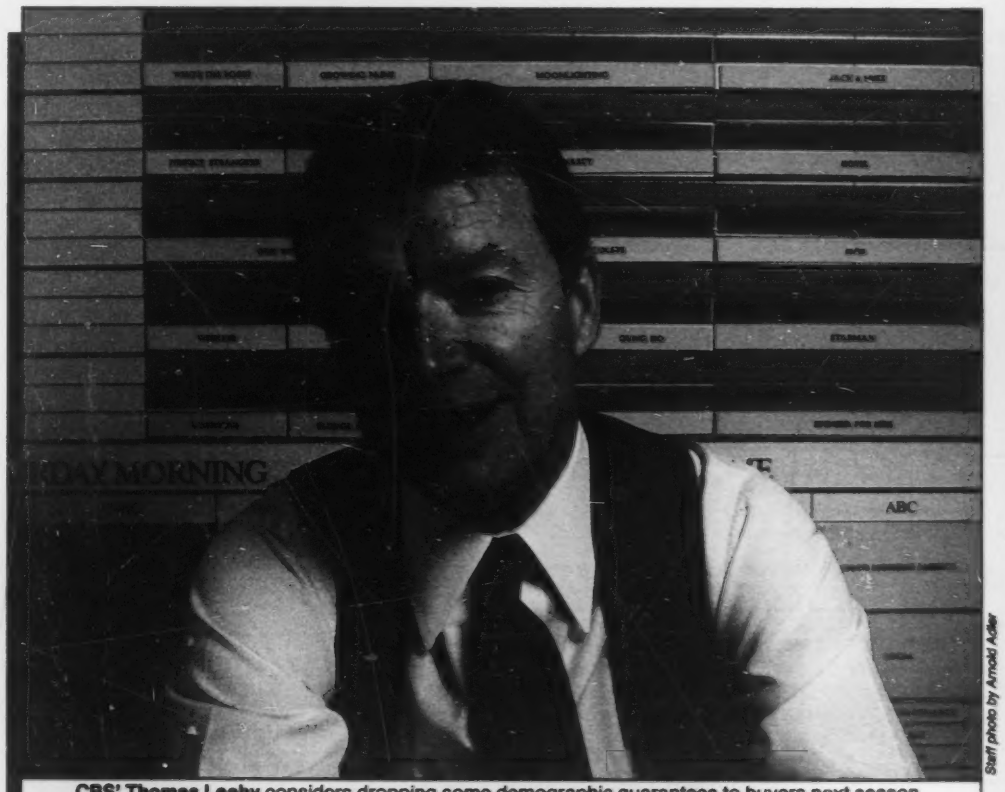
(Continued on Page 78)

Last Minute News

Mars is sweet to Saatchi

Hackettstown, N.J.—Mars Inc., satisfied that Saatchi & Saatchi Co. has cleared its decks of client conflicts, has awarded a secret, $30 million confectionery product to a second Saatchi agency, Backer & Spielvogel, New York. Although not condoning the agency holding-company concept, Mars is further indicating by the assignment it is willing to do substantial business with affiliated agencies once their loyalties are established. Earlier, it awarded new business to Saatchi & Saatchi, London (AA, Dec. 15, *et seq.*), after forcing DFS Dorland Worldwide to resign an estimated $30 million in Cadbury USA billings and the parent company to resign $14.6 million in Carnation and Rowntree Mackintosh billings. Mars would not comment on the nature of the confection but noted it will not roll out this year. Sources said Mars considers a confection any sweet-based product.

(Continued on Page 8)



Staff photo by Arnold Adler

CBS' Thomas Leahy considers dropping some demographic guarantees to buyers next season.

CBS' challenge

Seeks new way to sell TV

By VERNE GAY

New York—CBS Television Network is ready to change the nature of TV ad time buying.

The network wants to lay off some risk it assumes when it guarantees advertisers an audience size by instead "selling" TV time on its ability to move products or services. This also would get around anticipated audience shortfalls under the new people meter system.

In an interview last week, CBS-TV Network President Thomas Leahy said CBS next season will drop audience delivery guarantees for certain "small" demographic clusters, although he admitted he was being purposefully vague about which ones. CBS currently does not guarantee some demographic subcategories, such as women aged 25 to 34.

Mr. Leahy said that audience guarantees, which eliminate any semblance of risk for ad-

(Continued on Page 80)

Highlights

Consolidation under way at Chesebrough 1
After a worldwide agency review, Chesebrough-Pond's has transfered about $55 million in U.S. business to Ogilvy & Mather, a key agency of Unilever, which last week completed its acquisition of Chesebrough. McCann-Erickson, another major Unilever agency, has picked up the $14 million Vaseline line account in the U.S., which receives about $14 million in ad support.

CBS proposes new way of doing business 1
CBS Television Network is ready to change the nature of TV ad time buying. CBS' plan involves positioning network TV on its effectiveness in selling products rather than its cost efficiency.

Pet sheds origins 4
Pet Inc. finally has gained control of its destiny. In the nine years since Pet was acquired by Chicago-based IC Industries, the company has shed completely its origins as a commodities-based company subject to the whims of the market.

Ayer's exposure 6
The crucial evidence that led the Army to fire N W Ayer last year apparently was supplied by a single witness, the same New York production company executive who earlier helped expose a kickback scheme involving an Ayer VP working on the Army account.

Illinois ponders ad tax 24
The threat of possible state taxes on advertising and media services has spread to Illinois, where the ad community is bracing for a fight with Republican Gov. James Thompson. In what has been described as an informal proposal, the governor has suggested expanding the state's sales tax to include professional and other services.

FCC's heir apparent 28
After the Reagan administration's impressive record of deregulation at the Federal Communications Commission, its choice for the next FCC chairman, Dennis Patrick, faces a harsher political climate. The Senate and House, controlled by Democrats, are expected to be less enthused about further deregulation.

Nutrition for 'Self' 34
Self is reshaping itself editorially to focus more on health and nutrition in a refinement also expected to have advertising and marketing implications.

Networks reject condom ads 79
The Big 3 networks bent slightly but didn't break last week under congressional pressure to revise their policies against airing condom ads. Executives from ABC, CBS and NBC said their networks will continue to reject ads for condoms, because of the moral implications associated with all contraceptive advertising. But the nets left the door open for future policy changes.

INTERNATIONAL

Superchannel takes on Sky 54
Superchannel, the Pan-European satellite TV channel launched last month, is the first head-to-head competitor to Rupert Murdoch's Sky Channel. The channels' common goal is to increase the size of the tiny Pan-European TV advertising market.

O&M Stockholm reorganizes 54
Ogilvy & Mather's Stockholm office is experiencing a major upheaval and has dismissed most of its employees. A younger team of copywriters and art directors has been brought in to start a new agency, called O&M2.

OTHER NEWS

In an unusual link, Davis, Johnson, Mogul & Colombatto next month will join forces with Mexico's largest ad agency, Publicidad Ferrer, in a joint venture called Ferrer Ad America. Page 3.

VLI Corp. was one of six advertisers that modified or discontinued claims after a review last month by the National Advertising Division of the Council of Better Business Bureaus. Page 12.

Selected video stores soon will offer advertiser-sponsored videocassettes for at-home viewing. Video rental customers will be allowed to take home the advertiser tapes at no charge through a service called FreeVees by Video Information Network, Redmond, Wash. Page 22.

Prevention is stepping up efforts to boost advertising and circulation under its new publisher. "We want to demonstrate to everyone *Prevention* is a very strong factor in the health market," said Sanford Beldon, who last July became publisher of the Rodale Press monthly. Page 34.

Consumer promotions, effective in building short-term market share, may not have the long-term negative effects that worry some critics. Page 39.

Michael Ball, largely credited with building Ogilvy & Mather into the largest agency network in the Asia-Pacific region, is moving on. Last week Mr. Ball, who was chairman of the Ball Partnership, a second agency network spun off from O&M, announced he was joining the U.K.'s fast-growing WCRS Group. Page 77.

SPECIAL REPORT

The alcoholic beverage industry advanced 1.1% during the first half of 1986, thanks in large part to a 71.1% growth in the cooler category. The slight gain points to a new era in alcoholic beverage marketing.

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Pepsi-Jackson 'spectacular' set for spring

By NANCY GIGES

Pepsi-Cola USA is delaying the long-awaited debut of Pepsi TV spots with Michael Jackson until after the singer's new album is released sometime this spring.

The spots were set to air Feb. 24 on CBS' telecast of the Grammy Awards. Sources say the company and star mutually agreed it would be best to let Mr. Jackson reintroduce himself to the public via his new album, and not pre-empt his emergence with the TV spots.

> "We have some of the most spectacular advertising ever produced, and timing is critical. We are taking a hard look at that, and we will make an announcement Feb. 23."
> —*A Pepsi official*

The singer has not been very visible to the public for a number of months.

Purchase, N.Y.-based Pepsi calls the new spots the "most spectacular" ever created. BBDO Worldwide, New York, is the agency. When the spots do break, they are expected to account for a major portion of the $150 million Pepsi spends annually in advertising.

A Pepsi official would neither confirm nor deny the report of the new introductory plans. He said, "We have some of the most spectacular advertising ever produced, and timing is critical. We are taking a hard look at that, and we will make an announcement on Feb. 23."

Pepsi still plans to fill the five minutes of commercial time it bought on the Grammy Awards with new commercials for Pepsi and Diet Pepsi plus a 45-second teaser/preview spot for the new Jackson spots.

The Pepsi/Jackson spots mark a number of firsts. For one, the song that Pepsi expects to be the album's biggest hit is featured in one Pepsi spot. It is unusual to buy the rights for a TV commercial before the song has proved itself on the charts. Pepsi bought the rights as part of the $10 million deal it made with the entertainer.

The postponement also allows the expected hit song to be introduced as entertainment, rather than in the Pepsi spot. The Columbia/Epic album was to have come out this month or next, but has been postponed.

Another first: The two Jackson commercials cost a record $2 million-plus to produce, double the amount Pepsi spent in its earlier Jackson commercials.

According to sources close to the project, the singer is much more visible in these two spots than in his 1984 Pepsi deal when he limited the time his face was on camera to a few seconds.

In the second new spot, described as a lavish fantasy sequence, Mr. Jackson, chased by crowds, escapes in miraculous ways. In one scene he is chased into a museum, where he becomes

(Continued on Page 80)

Vons searching to replace Grey

EL MONTE, CALIF.—Vons Grocery Co., is reviewing its $10 million-to-$15 million broadcast account following a split with Grey Advertising, Los Angeles.

The supermarket chain initially is contacting eight to 10 Los Angeles agencies, but intends to pare the list to three or four soon. Early contenders are believed to be Admarketing, Chiat/Day, DDB Needham Worldwide, Keye/Donna/-Pearlstein, McCann-Erickson, Ogilvy & Mather, J. Walter Thompson/West and Della Femina, Travisano & Partners, Los Angeles. Another likely entrant is Cochrane Chase, Livingston & Co., Irvine, which last week lost the $10 million-to-$12 million Lucky Stores' Southern Food division (AA, Feb. 9).

About a year ago Vons reviewed its account (AA, March 24), but ultimately opted to keep its business at Grey. Two months ago, Von's named K/D/P agency for its Pavilions superstore grocery account, (AA, Dec. 8).

The moves precede Vons' pending merger with Detroit-based Allied Supermarkets and the arrival of VP-Advertising Larry Davis, a former executive with Lucky Stores. Vons officials were not available for comment.

Sega of America, South San Francisco, Calif., is moving what was to be a $20 million account at J. Walter Thompson/West, San Francisco, in-house. The split severs a 6-month relationship. The U.S. marketing arm of the Japanese videogame marketer will halve its U.S. ad budget in 1987 because of cuts in profits.

Giorgio Parfums, Beverly Hills, Calif., is contacting ad agencies concerning its $2.5 million women's and men's fragrance account now at Eisaman, Johns & Laws, Los Angeles. Among those battling the incumbent are BBDO/West and Ogilvy & Mather, Los Angeles.#

West Coast News

Special Report

Industry's successes help ease fear of a cloudy future

By Denise Frenner

Attempting to get a handle on evolving consumer taste preferences in an era of declining alcohol consumption is like trying to predict the weather. But producers can boast more than a few success stories, which at least partially clear the storm clouds looming on the industry's horizon.

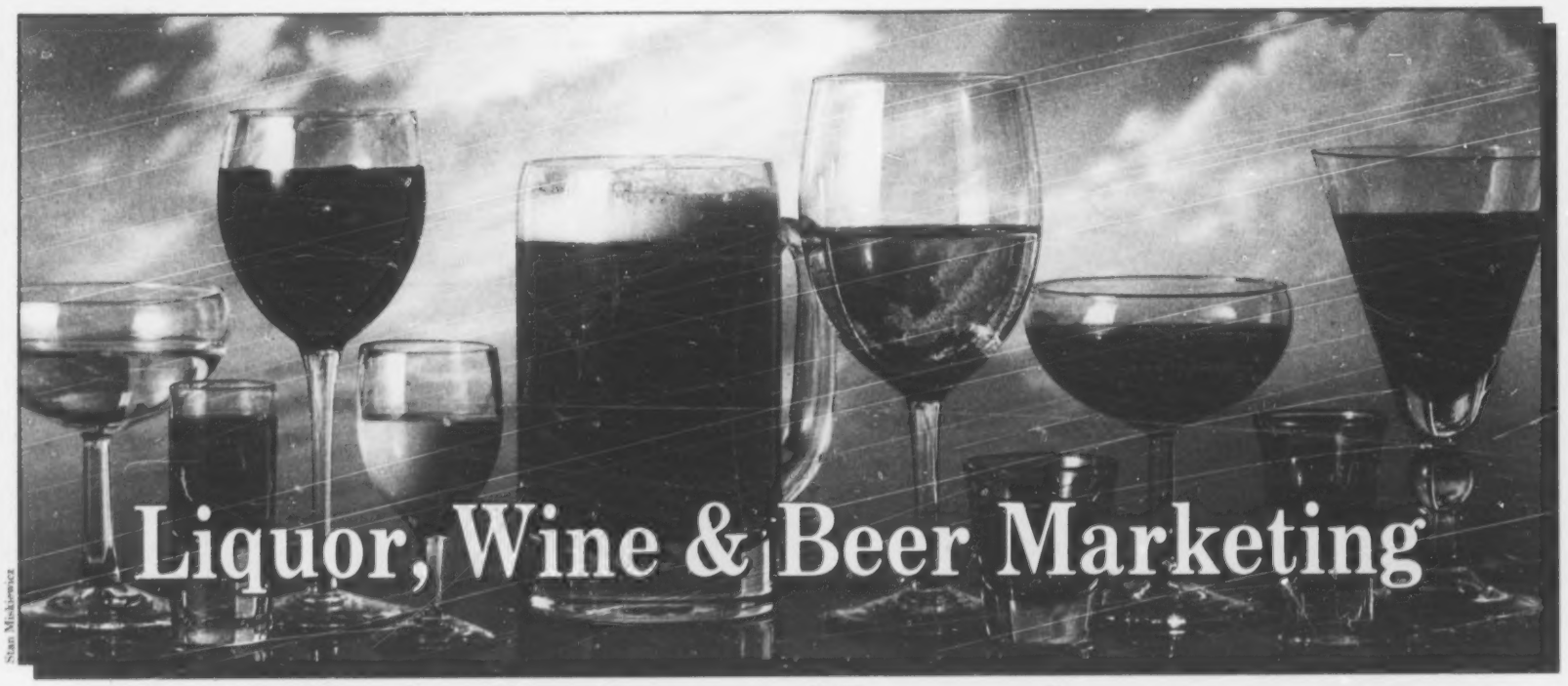
It already has been established that, for the moment, today's health-conscious consumers are looking for lighter, sweeter, lower-calorie and lower-proof products, preferably with some inherent snob appeal.

In response, alcoholic beverage marketers seeking new growth opportunities have marched out a bevy of new products, creating new categories, bolstering existing ones and blurring the lines between others. In many cases, their entries have been right on target.

Last year wasn't exactly a year to write home about. But the industry, buoyed by the cooler category's 71.7% growth, advanced 1.1%—approximately 37 million gallons—during the first half of 1986 compared with the same period in 1985, according to *Impact*, a New York-based industry newsletter. While the gain thus far is slight, it's a definite improvement over 1985, when the industry posted a 0.4% increase after a 0.2% dip in 1984.

Charting the future is probably best left in the hands of time. As Nicolas Furlotte, editorial director of the Jobson Liquor Group, New York, comments in the analysis below on the industry's future: "We are embarking on a new era of alcoholic beverage products and marketing ... Some brands that don't yet exist will likely find enormous success within the next 15 years."

One way to determine where consumer tastes might be heading, however, is to look at where they are today. Particular insight can be gleaned by examining products and categories that are registering gains or showing promise. This Special Report salutes a few that fit these criteria.



Stan Mickiewicz

Drinking in the future: New styles, new tastes

By Nicolas Furlotte

A top executive from one of the country's largest distillers recently told me he had noticed an increase in martini sales in bars and restaurants. He wanted to know if I had observed the same thing and did I think the martini, and other "traditional" cocktails, would make a comeback.

This is really part of a larger and frequently asked question about the alcoholic beverage industry: Is the business cyclical? Does consumption increase and decrease in any kind of historical or discernible pattern?

I can probably count on one hand the number of bars and restaurants that are serving a significantly greater number of martinis today than a year ago. It is unlikely that these drinks will come back into fashion to a degree great enough to influence overall spirits consumption.

There is no such thing as a comeback in the alcoholic beverage industry. There have been a few successful product reformulations and repositioning efforts, but, almost without exception, once a brand has gone into decline, it has never been successfully revived.

The same is true with the various categories of distilled spirits. Once a category has gone into a serious decline, it has never been brought back.

In terms of overall distilled spirits consumption, we are now drinking about as much as we were, on a per capita basis, in 1968. According to *Jobson's Liquor Handbook*, annual per capita consumption of spirits peaked at 2.04 gallons in 1979. Consumption has dropped about 1 quart per person since then. And it is not hard to imagine consumption dropping another quart per person within the next seven or eight years, if not sooner. That would put us at about 1.5 gallons per capita, roughly the same level as in 1965.

Nicolas Furlotte is editorial director of the Jobson Liquor Group, which includes Liquor Store *and* Stateways *magazines,* Jobson's Liquor Handbook, Jobson's Wine Marketing Handbook, Jobson's Liquor Industry Marketing, *and* Jobson's Liquor Handbook Advance.

Commentary

Are we really headed back to the future? In terms of consumption, probably yes. But in terms of what we drink, wishful martini thinking aside, probably not. Without sounding too grandiose, we are embarking on a new era of alcoholic beverage products and marketing.

The trends we have seen during the past decade, and more recently, will continue for the next five to 10 years, perhaps even longer. That doesn't necessarily mean, however, that by combining current taste preferences, a successful new product can be created—an imported, peach-flavored, low-proof, sparkling vodka, for example. On the other hand, some brands that don't yet exist will likely find enormous success within the next 15 years.

Prepared cocktails and cordials (the distinction becomes blurred at times) may hold the most potential for the distilled spirits business in the next 10 to 20 years.

Because taste preferences are evolutionary rather then cyclical, each generation claims a certain type of drink as its own. There was a time when the drink was bourbon. Later it was vodka, then white wine, and now, perhaps, bottled water.

But, of all the demographic groups influencing the alcoholic beverage business today, none is having a greater effect than the generation brought up on the sweet, fizzy taste of soda pop.

The alcoholic beverage industry might take a cue from the soda business where brands such as Slice, with real fruit juice as a prominently promoted ingredient, are the latest success. If I were in new product development, I'd be working on a carbonated cordial/prepared cocktail that featured, and heavily promoted, real fruit juice and would be marketed in four-packs or single-serve bottles.

That tastes are changing is a given, but because they're still evolving, neither the new generation of consumers nor the marketers trying to appeal to them knows exactly what it is they want. Joseph E. Seagram & Sons is making a determined effort with its spirits-based cooler line. James B. Beam Distilling has its line of Zzzingers and its promising Fletcher & Oakes (a schnapps-based cooler). Heublein Inc. has Tropic Freezer, a sort of cherry slush for adults.

(Continued on Page S-2)

Drinking trends
Per capita consumption by beverage
(gallons)

Beverage	1968	1978	1985
Beer	17.3	23.1	23.8
Wine	1.1	2.1	2.4
Distilled spirits	1.7	2.0	1.7

Source: *Beverage Industry*

New flavors spice up vodka category

By Patricia Winters

What do you get when you mix a cayenne pepper, a bottle of vodka and a yuppie? A whole new trend in the liquor industry.

For a decade, consumer demand in liquor has been for sweet, light, low-alcohol drinks. Witness the peach schnapps explosion, the popularity a few years ago of cream liqueurs or the continuing popularity of wine coolers.

But then young, upscale professionals discovered the Bloody Mary brunch and the Cajun martini dinner, and suddenly the trend has taken a 180-degree turn, spawning a shelf full of flavored vodkas ranging from basic pepper—such as Absolut Peppar—to the more exotic Stolichnaya's Zubrowka, a musky-tasting vodka flavored with northern European buffalo grass.

What happened?

"People like to try products that are new and different," says Peter Bordeaux, president of the Sazerac Co., New Orleans, which markets Chef Paul Prudhomme's Original K-Paul's Cajun Martini. "And Americans like spicy food."

While import giants Absolut and Stoli have only recently entered the flavored vodka arena, the category isn't really new. Flavored vodkas have been retailing in the U.S. since the repeal of Prohibition, and despite occasional marketing efforts, the drink never quite caught on.

The new generation of flavored vodkas is an outgrowth of three factors: A trend toward spicy food, a demand for full-tasting drinks and the recent popularity of imported vodka.

Imported vodka is growing rapidly, showing a 35% volume increase from January to November 1986, compared to the same period in 1985, according to the National Association of Beverage Importers, Washington. These gains are even more impressive in light of the fact that total white goods declined 7.6% during the first half of 1986, reports New-York based industry newsletter *Impact*.

Leading the flavored-vodka parade are Carillon Importers,

(Continued on Page S-4)

Distilled spirits growth rate

Type	1975-1980	1980-1985	1985-1990*
Whiskey	**−2.9%**	**−3.7%**	**−4.2%**
Bourbon	−2.6	−5.6	−6.5
Blends	−6.7	−5.2	−7.1
Scotch	−3.6	−3.2	−2.5
Canadian	0.9	−0.9	−2.0
White goods	**2.9%**	**—**	**−0.5%**
Gin	−1.1	−2.3	−2.6
Vodka	2.1	—	−0.5
Rum	10.2	2.9	—
Tequila	—	5.9	—
Specialties	**5.9%**	**2.7%**	**2.9%**
Brandy	5.9	2.4	2.1
Liqueurs	4.2	4.6	1.0
Cocktails	14.9	−5.6	14.9
Total spirits	**0.2%**	**−1.2%**	**−1.3%**

*estimate
Source: Impact Databank

The future

(Continued from Page S-1)

Schieffelin & Co. has Petite Liqueur, a wine-based cordial, and Kobrand Corp. is marketing Alize, a cognac and passion fruit mixture.

Convenience has been the traditional appeal of prepared cocktails, and the category has never been much more than the lazy man's answer to a Bloody Mary. But the most recent entries are a new breed of drink.

These and future new drinks may do for prepared cocktails and cordials what Lean Cuisine has done for TV dinners.

What else lies ahead for the alcoholic beverage industry?

- Cooler sales will continue to grow through 1990, but the enormous percentage gains of the past few years are over. The battle is now for market share and profitability. By 2000, coolers will be about as important as Boone's Farm is today. Today's cooler consumer will tire of the product.

In 20 years we may well look back upon coolers not so much as a sales phenomenon of the 1980s, but as a transitional product to a new style of beverages.

- The over-50 age group will become increasingly important and alcoholic beverage marketers who can reach this segment (it will be a richer, better educated and more sophisticated group than ever) will have struck gold.

But this group won't be attracted by non-alcoholic wine or beer. They will go for low-proof spirits, new drinks, and super-premium wines and cognacs.

- In general, high-priced, premium and super premium distilled spirits, wines and beers will continue to grow for the next three to five years. But there are limits to everything—prices can only go so high so fast. There are absolutes to the amount of money people will spend.
- The U.S. will never be a wine-drinking country, but it will become more sophisticated: Sales of premium and super premium varietal wines will grow over the next 15 years.
- Brand loyalty will erode as marketers increase their rebate/discount/coupon programs.
- Advertising strategies seem cyclical. Bottle and glass shots have given way to lifestyle and image advertising. Over the next three years, head-to-head comparative advertising—"our brand is better than yours"—will become increasingly prevalent as suppliers fight over a smaller pie. In 10 years, the creative director of a hot new ad agency will rediscover bottle and glass shots.
- Imported beers will grow for at least 10 more years.
- Domestic specialty/regional breweries and micro-breweries and their counterparts in the wine business will prosper in the next decade. The huge domestic brewers will continue to dominate the U.S. beer scene, but consumption will erode.
- Wines from non-wine states —Texas, for example—will gain favor, but never great sales.
- In 10 years, Australia will be this country's fourth largest source of wine imports.
- In 20 years, the last of the serious martini drinkers will have vanished from the face of the earth and the drink will never be heard of again.

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Flavors spice up vodkas

(Continued from Page S-2)

Teaneck, N.J.-based marketer of imported vodka leader Absolut from Sweden, and Monsieur Henri, White Plains, N.Y., marketer of No. 2 Stolichnaya Russian vodka. They are followed by smaller companies like Adamba Imports, Maspeth, N.Y., marketer of Luksusowa Polish potato vodka, and Sazerac Co.

A trend toward spicy food, a demand for full-tasting drinks and imported vodka's recent popularity all gave rise to flavored vodkas.

The product introductions started with pepper-flavored vodkas rolled out by Monsieur Henri and Carillon. Carillon decided to move ahead with its pepper-flavored vodka after noting the increasing number of trend-setting restaurants and bars that were marinating pepper in vodka for drinks like the Bloody Mary.

"We saw something happening where we felt we could provide a convenient product for restaurant and bar owners," explains Ernie Capria, Carillon director of marketing services.

Carillon introduced Absolut Peppar in September 1986, and has marketed heavily to on-premise establishments, gaining accounts in such trendy restaurants as the Hard Rock Cafe in New York.

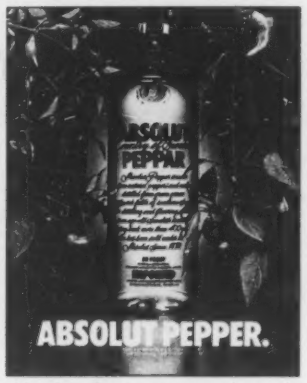
Absolut Peppar magazine ads, via TBWA Advertising, New York, use a lush product shot of the Absolut bottle in a jungle of peppers hanging from vines. The single copy line plays off the product name: "Absolut Pepper," and also off Absolut's long-running advertising approach of basing creative around the brand name.

Monsieur Henri, on the other hand, says a larger movement prompted marketers to introduce the new flavored vodkas. "With the trend toward tasteful drinks, we feel flavored vodkas are a natural line extension for Stolichnaya," says Larry Soll, Monsieur Henri VP.

MH introduced Pertsovka pepper-flavored vodka two years ago. Capitalizing on the growing Cajun rage, MH began advertising the brand and expanding distribution nationwide in the summer of 1986 via Calet, Hirsch & Spector, New York. Pertsovka case depletions increased 25% from 1984 to 1985, to a total of 10,000 cases, according to *Market Watch*, a New York-based industry magazine.

The company also started national distribution in 1986 of Okhotnichya, a vodka spiced with ginger, cloves, juniper, anise and lemon peel, among other ingredients. Last December it introduced Limonnaya, a lemon-flavored vodka, in New York, New Jersey, Boston, Chicago and Los Angeles. National roll-out is planned later this year. Monsieur Henri also plans to introduce Zubrowka later in the year. All are under the Stoli label.

So far, MH has only advertised Stolichnaya Pertsovka in New York and Los Angeles—two key trend-setting markets.

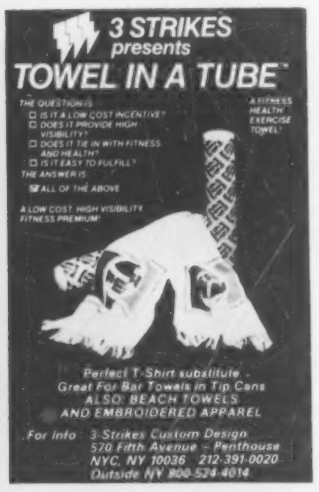


Absolut Peppar magazine ads display the product in a jungle of pepper-laden vines.

Ads, via CH&S, team regular Stoli ads with Stolichnaya Pertsovka. The first ad, showing an iced bottle of Stoli under a headline that says "Stoli. The Vodka" is contrasted with an ad showing reddish-colored Pertsovka, surrounded by red mist, under a headline that reads "Pepper Stoli. The Hot Vodka."

The company says it will team Stoli Limonnaya and Pertsovka in new ads this spring, via CH&S. Both Carillon and MH declined to disclose ad budgets.

No one thinks flavored vodka will sweep the country as the drink of choice, but many industry observers believe it will represent a long-term niche in the lucrative imported vodka segment. They say the flavored vodka market could reach 1 million to 2 million cases during the next few years.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But there's some disagreement about who is drinking flavored vodka. MH and Carillon view the market as an upscale phenomenon, with particular appeal among 25-to-50-year-old, metropolitan-area consumers.

The pepper-flavored vodkas, because of their strong flavor, are skewed slightly toward men. But Sazerac's Mr. Bordeaux believes pepper-flavored vodka, while attracting upscale professionals, also has strong appeal among minimum-age drinkers who down the stuff in shot glasses at nightclubs.

Vodka marketers "don't want to admit that people are doing shots any more than the cognac marketers advertise that a lot of people drink cognac with Coke because it's looked to be down-scale," says Mr. Bordeaux.

Sazerac hopes to attract this segment, as well as the more sophisticated drinkers, by pricing its Chef Paul's Cajun Martini at about $7.50 a bottle, some 40% less than the average price of Stoli or Absolut. An authentic cayenne pepper is attached to the bottle's neck, an interesting package detail that has a reason: Mr. Bordeaux says consumers can make their vodka spicier by marinating it further.

Despite initial positive response to the new breed of flavored vodkas, many are still watching the market cautiously. Says Jack Shea, spokesman for Farmington, Conn.-based Heublein Inc., marketer of Smirnoff, the world's largest-selling vodka: "Heublein's attitude is that there is just not enough evidence yet to know whether this is a fad or a long-term phenomenon. And we are not going to risk the reputation of the world's No. 1 vodka on a fad."

Ads for Stolichnaya Pertsovka broke in the summer of 1986.

But even those who question the longevity of flavored vodka in the market are capitalizing on the trend in promotion and marketing. Heublein, Mr. Shea says, is "encouraged by the phenomenon" and is taking advantage of the new interest in flavored vodka by promoting "The Smirnoff Guide to Flavoring Vodka," a booklet distributed in retail outlets that explains how consumers can flavor their vodka at home. Heublein also has lime-flavored and cherry-flavored vodkas under its largely unsupported Arrow line of cordials.

Mr. Shea notes that the brands exist to give people a choice, and while they aren't very big sellers, they have pockets of popularity in the Midwest, particularly in Wisconsin, Illinois and Ohio.

Adamba Imports, a small marketer of Polish goods, is certain flavored vodka is a fad, says Christina Gutt, marketing director. But increased interest in well-established imported vodkas is not, she says. This is why Adamba, which markets Starka, vodka distilled from rye, and Jarzebiak, a tart, berry-flavored vodka, will promote Zubrowka via local print and outdoor campaigns later this year.

> ***"Heublein's attitude is that there is just not enough evidence yet to know whether [flavored vodka] is a fad or a long-term phenomenon."***
> **Jack Shea**
> **Heublein Inc.**

Zubrowka has an established following among vodka connoisseurs and Europeans. And in Russia, Stoli Pertsovka is a favorite. Flavored vodkas, in fact, have actually been around for centuries. Okhotnichya, known as "hunter's vodka," was traditionally enjoyed by nobles in czarist Russia to celebrate a successful hunt.

America, which often starts worldwide trends, was a bit late on this one.

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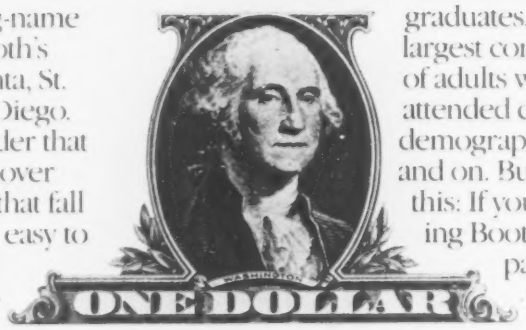

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Blush wines still blooming, but may soon turn pale

By Len Strazewski

When blush wines hit the racks in the late 1970s, one of the greatest wine industry innovations in recent history had arrived. It reached new consumer categories, pumped financial life into small wineries and rescued a once-popular grape from near extinction.

But now, some industry observers are saying the blush may soon be off the blush wine boom. Conditions are ripe for a shakeout, they say, and the business needs another product or marketing trick to keep growing.

"The boom is definitely over," says Nicolas Furlotte, editorial director of the Jobson Liquor Group, New York, publisher of *Jobson's Wine Marketing Handbook*. "There's a curve up and down to these things. The blush wines will do well this summer, but that's probably it."

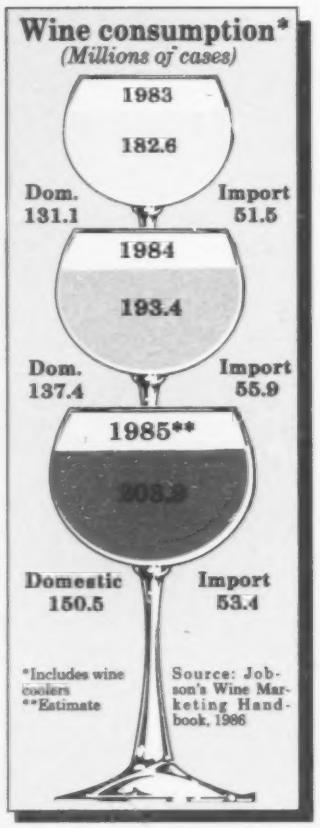
Wine marketers might argue that point. While there are no industry statistics on blush sales, production of the wines has been steadily rising. Industry sources estimate that some 3 million cases of White Zinfandel —which represents 90% of the blush market, according to sources—were produced last year. Indicative of the category's growth, Sutter Home Winery, St. Helena, Calif., sold half that amount in 1986, up substantially from its 25,000 cases in 1980.

It's because of the meteoric growth rate, however, and the sheer volume of contenders in the marketplace, that Mr. Furlotte predicts the blush category will soon top out.

"Mass producers are making a lot of it," he adds. "Some is of better quality, some of lesser quality." He forsees an industry shakeout, with some of the more mediocre products falling by the wayside.

David Pursglove, president of Wine Industry News, a Washington-based industry consulting company, predicts a collapse in the blush boom. Wine Industry News polls 2,500 "trend setters"—affluent East and West Coast consumers—and "trend emulators" about their tastes, and the latest survey says that trend setters never really liked the fruity, light pink wines that make up the blush category, which, besides White Zinfandel, includes White Cabernet and White Beaujolais, among others.

"Barely over 20% ever had any interest in the product at all," Mr. Pursglove says. "And without the interest of the real trend setters, the popularity can't be sustained. This summer will be the last of it."



Market leaders in the blush wine field, however, say the business is growing with little signs of collapse. Some agree it may eventually level off, and that a shakeout is likely. But for now, they maintain, blushes are still shepherding new customers into the wine-drinking fold.

Blush wines, a category of pink or rose-colored wines usually made from grapes pre-

Len Strazewski is a free-lance writer and former Special Report associate editor. He reported on wine coolers for the October 1986 Wine and Beer Marketing Special Report.

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viously reserved for stronger, more concentrated red wines, began bringing a touch of color to an otherwise drab wine industry in the late 1970s. By 1984, the whole industry was going pink, with everyone from mass jug-wine marketers such as Sebastiani Vineyards, Sonoma, Calif., and Almaden Vineyards, San Jose, Calif., to tiny mom-and-pop-owned wineries making the products.

Sutter Home Winery was one of the first to make White Zinfandel. A small, family-owned specialty winery previously known for a highly concentrated Red Zinfandel that had fallen out of fashion, Sutter Home began making a White Zinfandel to deal with an oversupply of zinfandel grapes.

In 1979 Sutter Home made a few thousand cases for on-winery sales. In 1980, the winery increased its White Zinfandel output to 25,000 cases and expanded its distribution to West Coast wine retailers—who bought every drop immediately.

Last year, Sutter Home, whose total output had been less than 100,000 cases during the 1970s, made 1.5 million cases of White Zinfandel. The winery estimates 1987 production at 2.25 million cases and sees no slackening in orders.

Sutter Home President Louis "Bob" Trinchero says he expects White Zinfandel's growth eventually will taper off, but that the category is not likely to collapse as Mr. Pursglove predicts. However, he does foresee a shakeout, as more than 100 wineries now make a blush wine product.

The next largest blush producer, with about a quarter of the White Zinfandel market, is Beringer Vineyards, St. Helena, Calif., which also started making the product in the late 1970s. Group product director Janelle Thompson doesn't see the blush business fading. With marketing savvy from its parent company, Nestle Foods, Beringer has taken its White Zinfandel into national distribution and has seen a steadily upward sales curve.

"White Zinfandel is a product that has touched the taste of the American consumer, and the taste shows no signs of changing," she says.

Beringer is the only winery to nationally advertise White Zinfandel to a mass market. Radio spots by Allen & Dorward, San Francisco, run on network and spot radio around the country. Ms. Thompson will not reveal the budget.

Cecil De Loach, president, De Loach Vineyards, Santa Rosa, Calif., has held his production stable at about 25,000 cases for the past five years, but not because he feared a bust.

"We just want to make some other wines," he explains. "We consistently sell out of the White Zinfandel and have requests for several thousand cases over our production run. And there's no reason to believe the demand is going to let up.

"In the beginning, nobody thought there was any sense at all to making the product," he continues. "But we tried it as an experiment and what we discovered was that we had finally cornered the taste the American public was after."

De Loach does a small amount of print advertising in publications including *The Wine Spectator*, but notes that White Zinfandels have been so popular that little marketing is needed to build demand. Mary Tanner, Sebastopol, Calif., handles a $40,000 annual ad budget.

Outside of White Zinfandel, other blush wines are continuing to do well. Sebastiani, which sells White Cabernet, White Beaujolais, White Zinfandel and Pinot Noir Blanc, reports all of the products doing well, up to expectations. Sebastiani's 1986 blush wine output was half a million cases.

And Almaden, which markets a White Zinfandel and a new "Blush Chablis" blend, says the market will continue to grow.

"We still expect it to grow, filling the niche that Chablis used to fill," says advertising manager Bob Delsol. "People want a light drinking wine that can be had with food or as a cocktail. The blush wines offer a little more choice and flavor."

Almaden's advertising is handled by Ciociola & Co. Advertising, New York, and the budget for 1987 is undetermined, pending approval of new parent Heublein Inc., which bought the winery late last year.

Among smaller blush wine producers, the attitude is also positive. Simi Winery, Healdsburg, Calif., has been making a Rose of Cabernet since 1974 and has seen no lack of interest. The winery prices its blush a bit higher than most at $7 a bottle, but sells out every year, says Michael Dixon, president, who also forsees a shakeout.

"I expect demand will steady out for blush wines and some of the bad ones may disappear, but the lighter, fruitier wines are here to stay, alongside the fine traditional reds and whites."

If the blush wine boom does wane, wineries probably won't be crushed. Jobson's Mr. Furlotte predicts continued growth in a line extension—Sparkling White Zinfandel. Both Sutter Home and Almaden made the product at a caseload of 100,000 each in 1986.

Sutter Home, the White Zinfandel specialist, is already using its new-found cash flow to diversify its offerings to include Cabernet Sauvignon, Chenin Blanc and Muscat d'Alexandria, as well as its Red Zinfandel.

And if blush wines pave the way for a return to traditional reds, as Mr. Pursglove and his trend surveys indicate, Sutter Home won't be embarrassed. The winery will be back in the same business it was in before anyone ever heard of a White Zinfandel.

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Genuine Draft pours new life into Miller sales

By Scott Hume

They said it couldn't be done. Miller Brewing has refused to believe them, and may yet prove them wrong.

"They" are the majority of brewing industry executives who long have clung to the principle that once a beer brand begins to decline in sales, rescue efforts are fruitless. But Miller is confident it will disprove that axiom by reversing the steady sales slide its once-powerful High Life brand has suffered during the past five years.

If Miller succeeds, much of the credit will belong to High Life Genuine Draft, a "flanker" brand Miller began testing in late 1985 before introducing nationally last spring. Genuine Draft's success—sales of more than 1.5 million barrels in 1986, according to industry analysts' estimates—has helped modernize and repopularize a brand name Miller Brewing was determined wouldn't fail.

Some observers are skeptical of Miller's chances, however. Manny Goldman, beverage analyst at Montgomery Securities, San Francisco, has called the High Life rescue mission "as great a challenge as [Miller parent] Philip Morris has ever had."

Brewing industry history supports the doubters, who point to Ballantine, one of the country's top sellers in the years after World War II, and Schlitz. Both brands went into tailspins from which they never recovered.

During the past several years, it has appeared that High Life might be inexorably marching along the same downward course taken by these and other has-been beers.

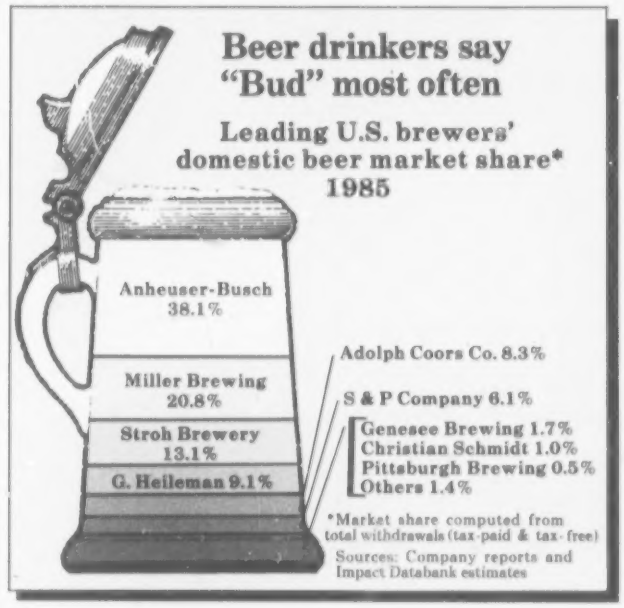
After Philip Morris acquired Milwaukee-based Miller Brewing in 1970 and pumped millions of dollars into the company's brewing and marketing capabilities, High Life's sales and share rose. According to analysts' estimates, High Life sales peaked in 1979 at 23.3 million barrels, second only to Anheuser-Busch's Budweiser at 31.4 million.

It's been downhill since then. By 1982 High Life was down to 20.3 million barrels; by 1984 it had plummeted to 14.1 million. Last year it fell below 12 million barrels, analysts estimate, although it remains the nation's third most popular brand.

Miller execs say that they have met the challenge, that High Life's sales erosion slowed in 1986 and that they now are beginning the process of building original High Life's sales.

Despite its unflagging confidence that High Life eventually would turn around, Miller made two important strategic moves in 1984, as High Life sales were plummeting: It opened for review the $50 million High Life advertising account then held by Backer & Spielvogel, New York, and it began more aggressively testing new beer brands to bolster its market presence, especially in the premium-price category. Both actions have produced results aiding recovery.

After 20 months of deliberation, Miller in August 1985 awarded J. Walter Thompson USA, New York, the High Life assignment. Its "Made the American way" campaign, replacing B&S' "Welcome to Miller time" positioning, helped give High Life a tougher image that has broadened its appeal, Miller execs say.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Others 1.4%
*Market share computed from total withdrawals (tax-paid & tax-free)
Sources: Company reports and Impact Databank estimates

The parade of new-product tests has included popular-price Meister Brau Light and low-alcohol Sharps L.A. in August 1984; premium-price, draft-style Plank Road Original Draught in October 1984; premium-price Gettelman Lager in July 1986; and premium-price "wheat beer" Dakota in September 1986. Of these brands, Meister Brau Light is currently available nationally, Sharps is in limited markets, Gettelman has been discontinued, Plank Road is being retooled, and Dakota is still in the test phase.

The most intriguing of the premium-price test products was Plank Road Original Draught. Hamish Maxwell, chairman of Philip Morris, for some time had been suggesting that Miller consider the draft-beer niche.

"With his international experience and perspective, [Mr. Maxwell] asked us to look into packaged draft beer," says Miller group product manager Jerry Schmutte. "It represents one-third of Japanese volume, but its U.S. penetration has been inconsequential."

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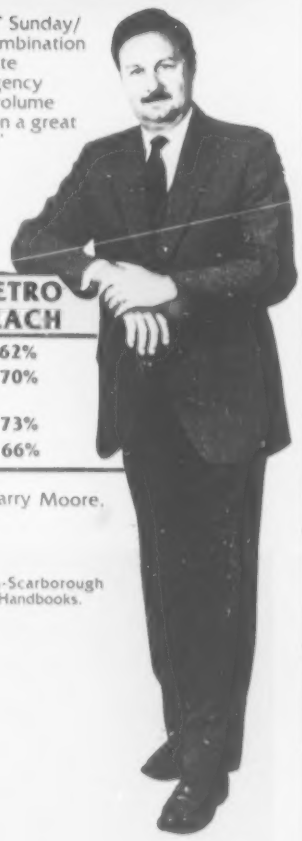

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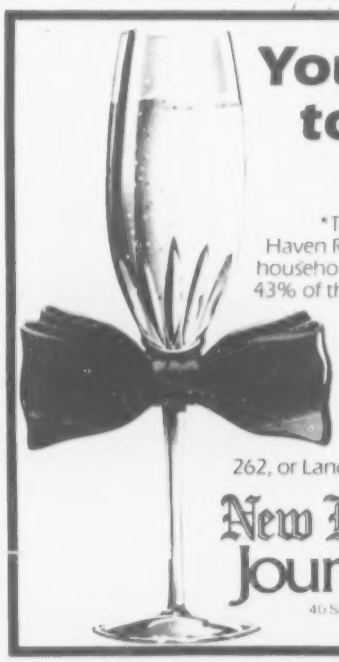

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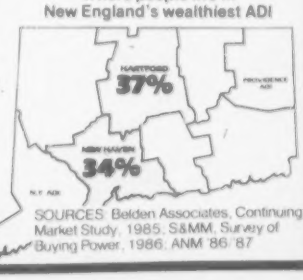

SOURCES: Belden Associates, Continuing Market Study, 1985; S&MM, Survey of Buying Power, 1986; ANM '86-'87

New Haven Register and Journal-Courier
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Mr. Schmutte says it was "a concern but not a worry" that by selling its own draft beer, Miller might aid the sales of Coors, also an unpasteurized, or "draft" beer. "I don't think the average consumer immediately thinks of Coors as a draft beer. They haven't pushed [that attribute] that hard," Mr. Schmutte says. "But our draft process is different. We went to Sapporo Brewery in Japan and imported their technology for using ceramic filters to remove impurities. It's different than the process Coors uses."

There was only one problem: Plank Road test results "did not set the world on fire," he says. "Plank Road was a strong test, but probably not the optimal one.

"But we knew there was something there. We had too much research that said consumers prefer draft beer. So we decided to try again with it as a line extension, and we hit the second time around."

That second try, of course, was High Life Genuine Draft, an assignment this time given to Backer & Spielvogel, Miller's agency of record and creator of the classic "Lite All-Stars" advertising series.

Where Plank Road had been received with a yawn, "distributors, retailers and consumers sparked to Genuine Draft from the start." It captured the 1%-plus market share the brewer looks for from test products, Mr. Schmutte says. After testing in 24 markets for less than six months, Genuine Draft was rolled nationally last spring.

Why did Genuine Draft succeed where Plank Road failed? Mr. Schmutte points to three important factors: Name, packaging and advertising.

"There's no question the Miller High Life name was a boost," he says. "There have been few successful launches of beers with free-standing brand names. They don't have the value of heritage and tradition, and the consumer wants to think there's some substance, some history to a brand."

While the High Life name helped Genuine Draft, the reverse also has proved true. Miller was concerned about "diluting" the High Life brand with a flanker brand, but "the addition of Genuine Draft has energized all the equity we have in the Miller name."

Landor Design, San Francisco, developed Genuine Draft's packaging. While keeping the basic elements of original High Life's look, including the clear glass bottle, Landor also managed to set Genuine Draft apart with a black foil label that Mr. Schmutte says gives it "a more masculine image."

"Package design can be the most important element, especially for a new beer," says Mort Libby, a principal in Libby Perszyk Kathman, Cincinnati, which has done design work for Coors, Schoenling Brewing and others. "Like food products, beer is sold on taste, but you can't use photos to increase appetite appeal like you can with cake packaging. So you have to design a label that has emotional appeal."

Says partner Ray Perszyk: "Personality drives beer marketing, and packaging has to convey the personality you want a beer to embody."

In place of the manufactured history and re-creations of old-time breweries used in Plank Road advertising (from Chiat/Day, New York), the Genuine Draft campaign has been purposely straightforward and simple. Executions in all media play off that research-based belief that consumers prefer draft beer; they share the theme line, "Beer at its best."

In 1986, Miller spent approximately $30 million on media advertising for Genuine Draft, compared with nearly $60 million for original High Life. This year, however, sources say Miller is reversing that ratio, budgeting $75 million for the draft version and $30 million for the regular brand. Miller execs would not confirm that report.

Print ads share the "Beer at its best" theme with other media.

Print ads show a spiggot-equipped Genuine Draft bottle and the no-nonsense headline, "Look guys, no keg." Fifteen-second TV commercials say simply, "When you want the rich, smooth, fresh taste of real draft beer in a bottle [or can], ask for Miller Genuine Draft. The Miller with the black label." Thirty-second spots say Genuine Draft "will remind you of the best beer you ever had."

Some industry observers project Miller Brewing's total production for 1986 up nearly 4% to 38.5 million barrels, with Genuine Draft's success a major contributing factor. For the first time in years, Miller is able to suggest convincingly that the worst of High Life's troubles are behind it.

"We consider Genuine Draft a success," Mr. Schmutte says. "We know that it has captured people's imagination, and it has exceeded our initial goals.

"We look at Miller High Life as a franchise, and we're determined to strengthen it. Original High Life is still the No. 3 brand [behind Budweiser and Miller Lite], so any talk of Genuine Draft dethroning it or threatening it is preposterous. The two are moving together to turn around that franchise. We've reduced the rate of decline and strengthened the Miller brand name.

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Sources: Readership—Belden CMS, March-December 1985. Liquor Rank—Liquor Handbook, 1986

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MAXWELL'S MARKET SHARES

Excise tax hike hurts liquor sales

By JOHN C. MAXWELL JR.

In 1986 the liquor industry experienced approximately a 5%-to-6% volume decline, due primarily to the impact of the federal excise tax increase in October 1985. Domestic cordials, imported brandy, tequila and imported vodka were the only exceptions.

Tequila's impressive 5% gain (relative to the industry decline) is largely attributable to Heublein's Jose Cuervo, up 20%. This increase may be an effect of the growing popularity of Mexican food and drinks (witness the amazing jump of Corona to the No. 2 position in imported beers). Cordials were up almost 0.5% due to domestic growth, probably from flavored schnapps. An impressive increase was the 36% rise of imported vodka, with particularly strong gains made by Absolut, up 47.1%.

The outlook for 1987 is another year of volume decline in spirits with the exception of specific imports such as vodka and brandy.

Of the top 10 brands, almost all showed declines. The one exception was Heublein's Popov vodka, which increased 4% and moved from sixth to fourth position. Of the 1985 leading brands (those that sell over 1 million cases) only three brands showed volume gains. Aside from the increase of Popov, Peachtree schnapps, which was introduced in 1984, doubled its volume and rose from the 24th to the 12th top-selling brand. Another share increase was seen by Heublein's Jose Cuervo tequila, which rose to 25th from the 34th position. The only newcomer to this list was Absolut vodka.

As a result of the success of National Distiller's Dekuyper's Peachtree schnapps, the Dekupyer line overall maintains its position for the second consecutive year as No. 1 in the cordial area.

This extraordinary growth seems to illustrate the acceleration of a new drink trend with great potential. With the over 60 varieties, peach being the most popular, schnapps drinkers have a tremendous selection to choose from. Furthermore, the low alcohol content, approximately 45%, not only appeals to those who are health-conscious, young and female, but also provides a compromise to the deadly mixture of drinking and driving. We feel that this type of drink not only has more o[illegible] aspects which attract consun[illegible]s to wine coolers, but can appeal to an even greater audience on the basis of its variety and versatility. We believe that while the wine cooler trend wll continue, the impact of schnapps will minimize future wine cooler growth while accelerating the trend toward lower-proof, "healthier" alcoholic drinks.

Another area trend that has shown continued good growth is imported vodka. Despite the decline of total vodka, about in line with the industry, imported vodkas are up approximately 36%. As mentioned earlier, Absolut increased 47.1%, while Stolichnaya increased 17% and Finlandia increased 12%. It appears that drinking vodka on the rocks is becoming more popular, explaining the increased demand for higher quality imports. Ths growth appears to be occurring at the expense of domestic vodkas and possibly scotch.

One new product which does not follow the general trend is Elijah Craig, introduced in September 1986 by Heaven Hill. In the face of a declining bourbon category, Elijah Craig is a 12-year-old, 94-proof bourbon positioned to compete against fine wines, scotches and cognacs. As this is such a recent introduction, we cannot yet determine the outcome of this new entry.

For the first nine months of 1986, advertising expenditures were down approximately 10% from the year earlier. This is a continuation of the decline that has occurred over the past few years. Increasingly the industry has tried to assuage its opponents' criticisms; for instance, one company solicited an advertising campaign promoting the "designated driver" idea. Aside from having its altruistic tones, the ad is a good selling campaign in that it reminds drinkers that as long as they have a designated driver they can stop worrying about driving and drink as much as they like. This appears to have been well-received by consumers.

Overall, it appears as though alcohol consumption will continue to decline with greater consumer health consciousness and the desire to lower alcohol intake. Excluding any new tax increases, we expect the liquor industry to decline in the area of 2% to 3% per year in unit volume.#

Mr. Maxwell is with Furman Selz Mager Dietz & Birney, New York.

Top-selling liquor brands

Brands selling more than one million cases. *Estimate. *Source: John C. Maxwell Jr., Laidlaw Ansbacher, New York.*

Rank '85	Rank '86	Brand	Company	Nine-liter cases (000) 1985	1986*	Change
1	1	Bacardi	Bacardi	8,509	7,927	−6.8
2	2	Smirnoff	Heublein(RJR)	7,665	7,662	—
3	3	7Crown	Seagram	5,100	4,600	−9.8
6	4	Popov	Heublein (RJR)	4,024	4,183	+4.0
4	5	Canadian Mist	Brown-Forman	4,326	3,975	−8.1
5	6	Jim Beam	James Beam (AB)	4,045	3,800	−6.1
9	7	V.O.	Seagram	3,620	3,455	−4.6
7	8	Windsor Supreme	National	3,795	3,415	−10.0
8	9	Jack Daniel's	Brown-Forman	3,643	3,225	−11.5
11	10	Canadian Club	Walker (HWR)	3,235	3,100	+4.2
20	11	Seagram's Gin	Seagram	3,250	3,065	−5.7
24	12	Peachtree Schnapps	National	1,500	3,000	+100.0
12	13	Gordon's Gin	Schenley (RA)	2,585	2,455	−5.0
13	14	Dewar's	Schenley (RA)	2,370	2,370	—
15	15	Kamchatka	National	2,323	2,160	−7.0
14	16	Gilbey's Gin	National	2,350	2,115	−10.0
16	17	J&B Rare	Grand Metro	2,230	2,100	−5.8
17	18	Black Velvet	Heublein (RJR)	2,151	2,082	−3.2
18	19	Gordon's Vodka	Schenley (RA)	2,125	2,020	−4.9
19	20	Gilbey's Vodka	National	1,945	1,845	−5.1
20	21	Kahlua	Walker (HWR)	1,750	1,750	—
22	22	Christian Brothers	Fromm & Sichel	1,830	1,740	−4.9
23	23	Ancient Age	Ancient Age	1,650	1,600	−3.0
21	24	Early Times	Brown-Forman	1,797	1,525	−15.1
34	25	Jose Cuervo	Heublein (RJR)	1,152	1,384	+20.1
25	26	Johnnie Walker Red	Somerset (D)	1,450	1,375	−5.2
29	27	Tanqueray	Somerset (D)	1,325	1,310	−1.1
26	28	Crown Royal	Seagram	1,375	1,280	−6.9
31	29	Southern Comfort	Brown-Forman	1,229	1,150	−6.4
27	30	Cutty Sark	Buckingham (WB)	1,140	1,140	—
33	31	Beefeater	Kobrand	1,190	1,110	−6.7
30	32	Kessler	Seagram	1,260	1,100	−12.7
32	32	Lord Calvert	Perennial (S)	1,200	1,100	−8.3
33	33	Old Grand-Dad	National	1,190	1,070	−10.1
35	34	Calvert Extra	Perennial (S)	1,150	1,035	−10.0
28	35	Ten High	Walker (HWR)	1,339	1,000	−25.3
—	35	Absolut	Grand Metro	680	1,000	+47.1

Key to parent corporations: (AB) - American Brands, (D) - Distillers Co., (G) - Glenmore, (GM) - Grand Metropolitan, (HWR) - Hiram Walker Resources, (RA) - Rapid-American, (RJR) - R.J.Reynolds, (S) - Seagram, and (WB) - Whitbread.

Sherman signs scotch deal

ST. LOUIS—David Sherman Corp. has signed a deal with William Whitely & Co., a Scottish distiller, to distribute its House of Lords Deluxe Blended Scotch whisky in the U.S.

Fremerman, Rosenfield & Lane, Kansas City, will handle advertising. Outdoor and newspaper ads will break in April in Texas.#

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February

	Current month 1987	Current month 1986	Year-to-date 1987	Year-to-date 1986
— Art & antiques —				
Art & Antiques	45.0	49.7	91.8	93.3
Southwest Art	61.0	59.5	115.9	114.7
Total Group	106.0	109.2	207.7	208.0
% change		-2.9%		-0.2%
— Auto/cycle/rec. vehicles —				
Autoweek (52X)	115.5	121.2	227.5	261.9
Car & Driver	64.9	80.4	148.4	172.2
Car Collector & Car Classics	15.8	14.5	31.8	28.8
Car Craft	64.0	59.6	113.8	106.6
Circle Track	56.6	62.8	100.7	102.5
Cycle	39.6	36.6	63.9	65.3
Cycle Guide (9X)	36.3	28.3	64.9	49.6
Cycle World	46.8	39.9	71.8	77.6
Dirt Rider	30.7	22.7	62.8	57.7
Dune Buggies & Hot VWs	69.6	83.9	146.6	176.0
Family Motor Coaching	135.4	136.3	303.4	314.0
4 Wheel & Off Road	67.4	71.9	127.4	138.1
Four Wheeler	92.0	76.0	184.0	75.2
Hot Rod	62.5	57.3	105.4	95.0
Motorcyclist	32.9	40.9	47.1	66.0
Motor Trend	51.2	69.5	105.2	123.7
Motorhome	75.8	91.6	152.1	176.5
Rider	35.7	43.3	61.5	72.4
Road & Track	86.4	80.9	158.8	159.3
3 Wheeling	38.4	56.7	78.4	121.6
Trailer Life	87.3	113.0	174.7	214.5
Total Group	1,304.8	1,387.2	2,530.2	2,654.5
% change		-5.9%		-4.7%
— Boating & yachting —				
Boating	177.0	166.8	368.0	328.0
Chesapeake Bay	46.5	39.5	82.3	69.5
Cruising World	101.3	114.3	202.1	225.8
Lakeland Boating (10X)	69.5	64.5	149.0	124.0
Motor Boating & Sailing	190.7	233.5	414.2	466.4
Sail	108.4	116.7	203.8	222.5
Small Boat Journal(6X)	—	—	58.8	53.1
Trailer Boats (11X)	71.6	46.9	131.9	87.6
Western Boatman(6X)	—	—	44.1	54.7
Yachting	131.3	135.5	329.2	326.3
Total Group	896.3	919.7	1,983.3	1,958.0
% change		-2.5%		+1.3%
— Canadian —				
L'Actualite	68.7	89.0	105.9	140.3
Chatelaine				
English Edition A.	84.9	97.9	125.0	159.3
French Edition	68.2	85.0	108.6	136.1
City & Country Home (8X)	37.8	—	37.8	—
Flare A.	48.1	43.4	84.5	70.9
Macleans (52X) A.	79.0	122.4	180.2	235.5
Moneywise	33.5	39.9	61.4	71.0
Montreal Calendar (10X)	—	—	15.3	22.0
Montreal Ce Mois Ci (9X)	—	—	14.6	23.0
Reader's Digest				
Canadian-English A.	58.7	72.2	102.5	139.6
Canadian-French A.	43.2	53.5	78.5	106.5
Toronto Life	73.8	79.1	137.1	140.5
Total Group	592.9	682.4	1,048.3	1,246.7
% change		-13.1%		-15.9%
— Civic/fraternal —				
American Legion	36.9	30.4	77.1	59.2
Elks (10X)	23.5	22.0	49.3	42.1
Kiwanis	19.6	23.1	35.3	40.0
Lion (10X)	11.3	6.0	18.6	13.3
Rotarian	20.9	13.2	28.5	31.4
V.F.W. (11X)	33.7	31.8	66.0	61.9
Total Group	145.9	126.5	274.8	247.9
% change		+15.3%		+10.9%
— Comics —				
DC Comics	6.0	5.0	14.0	12.0
Marvel Comics Group	10.0	6.0	19.0	15.0
Total Group	16.0	11.0	33.0	27.0
% change		+45.5%		+22.2%
— General —				
American Health (10X)	—	—	64.2	55.6
American West (6X)	—	—	29.3	50.5
The Atlantic A.	30.4	25.9	58.0	65.2
Audubon Magazine (6X)	—	—	29.5	29.6
Bon Appetit A.	87.8	83.3	141.7	140.3
Changing Times	58.0	49.2	123.9	99.4
Connoisseur	69.3	41.1	107.1	86.4
Consumers Digest (6X)	—	—	27.5	25.3
Ebony	107.7	107.1	179.5	177.6
Food & Wine	54.2	43.4	89.4	74.2
Games (6X)	17.9	18.3	31.4	40.8
Gourmet	91.7	75.4	148.3	129.4
Harper's A.	27.0	22.2	56.0	45.7
Harrowsmith (6X)	—	—	54.4	53.5
Let's Live	44.0	45.0	89.0	88.0
Life	35.9	36.7	88.4	105.3
Modern Maturity (6X)	37.1	41.5	37.1	41.5
Money	129.2	106.7	220.0	204.9
Moneyworth (4X)	—	—	13.1	10.0
Mother Earth News (6X)	—	—	62.3	56.7
Mother Jones (9X)	19.8	19.7	42.0	41.9
National Geographic	18.6	16.9	30.6	36.1
Natural History	38.2	47.6	78.3	98.6
Prevention	75.1	67.8	141.6	127.4
Psychology Today	31.6	24.6	63.6	45.8
Reader's Digest A.	77.2	68.1	142.8	139.9
Rx Being Well (6X)	—	—	27.0	22.0
Saturday Evening Post (9X)	—	—	42.9	37.7
Signature	55.0	52.2	142.0	104.1
Smithsonian	71.9	64.8	131.7	150.6
Sylvia Porter's Personal Finance (10X)	—	—	64.7	54.2
Town & Country	108.3	103.7	190.4	190.1
Travel-Holiday	56.6	42.8	97.8	77.3
Travel & Leisure	73.1	110.5	138.2	197.3
Vanity Fair	43.6	39.8	68.1	76.8
Writer's Digest	24.2	22.2	51.5	41.8
Total Group	1,483.2	1,376.2	3,103.2	3,021.1
% change		+7.8%		+2.7%
— Home —				
Architectural Digest A.	86.1	81.7	169.8	184.7
Better Homes & Gardens	92.8	107.7	145.1	170.9
Colonial Homes (6X)	—	—	44.0	52.4
Columbus Monthly-Homes (4X)	—	—	22.6	21.9
Country Home (6X)	—	—	36.2	38.5
Country Living	83.6	66.8	142.1	128.7
Dallas/Ft. Worth Home & Garden	31.5	59.9	84.6	142.2
Family Handyman (10X) A.	57.2	61.6	103.9	121.8
Flower & Garden (6X)	51.8	53.6	51.8	53.6
Home	68.1	63.5	100.4	101.2
Home Mechanics	64.3	66.5	105.1	124.6
The Homeowner (10X)	—	—	40.5	35.2
Horticulture	35.3	34.3	75.7	81.7
House Beautiful	56.2	54.0	99.2	109.2
House & Garden	86.1	84.8	137.9	145.9
Houston Home & Garden	77.6	82.3	119.9	136.3
Metropolitan Home	60.2	50.7	94.1	82.9
1,001 Home Ideas	45.3	44.8	81.7	88.3
Phoenix Home/Garden	80.7	88.0	140.5	144.0
Practical Homeowner	74.4	73.3	113.3	116.8
Rodale's Organic Gardening	71.9	76.6	127.7	153.3
South Florida Home/Garden	33.9	30.0	71.6	59.6
Southern Accents (6X)	—	—	84.1	107.8
Southern Living	103.2	109.4	176.3	204.8
Sunset Magazine A.	107.0	125.5	168.6	221.5
Texas Homes	33.2	57.6	82.2	141.6
Workbench (6X)	—	—	49.4	51.2
The Workbasket	37.4	46.8	65.1	88.6
Total Group	1,437.6	1,519.4	2,733.1	3,109.2
% change		-5.4%		-12.1%
— In-flight & other passenger —				
Alaska Airlines	55.8	43.6	107.9	101.8
America West Airlines	43.5	—	86.1	—
American Way (24X)	96.4	86.6	180.4	175.2
East/West Network				
Eastern Review	72.2	109.7	150.0	199.5
Northwest	44.5	46.2	83.5	91.4
PSA Magazine	80.0	96.8	145.3	185.3
Pan Am Clipper	36.0	52.7	79.2	102.9
Spirit	52.7	93.2	110.0	178.7
TWA Ambassador	43.5	—	86.0	—
United	61.2	81.5	114.4	167.1
Western's World	39.0	66.5	80.0	130.3
Halsey Publications				
Air Cal	50.0	41.0	93.5	83.4
Delta Sky	69.7	67.3	139.3	129.7
US Air	36.2	41.7	77.7	76.5
Pace	95.1	95.3	168.5	155.1
Presidential Airways (6X)	3.5	11.2	3.5	11.2
Spirit of Aloha (6X)	34.0	30.8	68.0	61.5
Total Group	913.2	964.1	1,773.3	1,849.5
% change		-5.3%		-4.1%
— Men's —				
Esquire A.	61.3	53.3	105.8	97.0
Firehouse Magazine	29.8	30.8	76.8	72.6
Gentlemen's Quarterly A.	115.6	124.0	170.4	180.8
M Magazine	89.9	55.8	125.1	82.0
Penthouse A.	33.0	30.3	77.4	76.6
Playboy A.	33.1	42.0	93.7	114.5
Salute	—	—	—	—
Total Group	362.6	336.2	649.3	623.4
% change		+7.9%		+4.1%
— Metropolitan —				
Aloha (6X)	—	—	28.9	23.0
Atlanta	53.9	43.1	105.8	89.6
Baltimore	78.7	70.1	137.1	126.5
Boston	143.1	141.5	277.1	273.1
California	59.1	43.7	96.4	90.1
Chicago	87.8	110.3	166.7	193.1
Chicago's North Shore	62.5	58.6	141.3	136.3
Cincinnati	38.6	56.2	83.9	109.1
Cleveland	50.6	57.2	103.0	117.5
Coast (39X)	61.2	53.1	121.2	53.1
Columbus Monthly	44.8	48.1	105.1	98.4
Connecticut	92.5	87.4	175.7	171.1
D/Magazine, Dallas/Ft. Worth	117.0	111.5	207.6	223.5
Denver	34.7	45.0	56.2	77.2
Detroit Monthly	51.2	59.8	147.1	204.4
Grand Rapids	34.7	26.3	64.4	60.5
Gulfshore Life (10X)	—	—	—	—
Honolulu	50.8	49.8	107.0	107.7
Houston City	38.2	50.1	77.8	90.7
Louisiana Life (6X)	—	—	28.8	40.5
Madison	68.0	66.0	122.0	126.0
Metropolitan Detroit	52.0	67.0	96.3	103.0
Miami Mensual	39.0	46.3	81.5	98.1
Miami/South Florida	46.2	63.1	100.1	152.1
Mid Atlantic Country	49.5	32.3	71.3	58.8
Milwaukee	53.8	53.3	85.8	100.5
Minneapolis/St. Paul	80.5	101.5	141.8	166.3
Nashville	45.0	45.0	89.0	90.0
New England Monthly	32.4	24.9	64.0	68.1
New Jersey Monthly	86.0	81.6	156.2	144.5
New Mexico	17.3	14.5	68.8	57.5
Ohio	39.6	36.7	107.4	97.3
Oregon	—	—	—	—
Orlando	84.1	102.7	169.0	201.2
Palm Beach Life	110.3	101.3	203.5	196.0
Palm Springs Life	153.3	141.8	284.1	278.3
Philadelphia	108.6	110.5	240.6	213.8
Phoenix	71.9	90.1	147.0	193.6
Pittsburgh	60.6	55.6	110.7	93.7
St. Louis	53.5	43.8	89.2	80.5
San Diego	135.3	135.8	245.8	262.2
San Francisco	—	—	—	—
San Francisco Focus	93.2	77.2	150.5	143.5
Texas Monthly	64.0	84.0	142.1	278.5
Twin Cities	41.9	36.4	76.5	76.3
The Virginian	—	—	52.1	48.7
Washington (7X)	—	—	47.0	61.0
The Washingtonian	153.0	141.8	270.7	253.5
Total Group	2,838.3	2,864.8	5,643.9	5,928.4
% change		-0.9%		-4.8%
— Movie/romance/radio/tv —				
Macfadden's Women's Group				
Modern Romances	25.2	25.3	43.8	37.0
Secrets	25.2	25.3	43.8	37.0
True Confessions	25.2	25.3	43.8	37.0
True Experience	25.2	25.3	43.8	37.0
True Love	25.2	25.3	43.8	37.0
True Romance	25.2	25.3	43.8	37.0
Sterling Women's Group				
Daytime TV	24.2	25.8	48.4	49.6
Modern Screen	14.5	15.5	14.5	15.5
Movie Mirror (6X)	14.5	15.5	14.5	15.5
Soap Opera Stars	14.5	16.8	14.5	16.8
TV Movie Screen (6X)	7.3	8.3	7.3	8.3
TV Picture Life (6X)	1.0	4.3	1.0	4.3
TV Game Show	—	—	—	—
Total Group	227.1	237.9	362.9	332.1
% change		-4.6%		+9.3%
— Music/entertainment —				
Audio	60.4	59.5	157.9	154.4
Circus Magazine	—	—	—	—
Dance Magazine	55.8	54.6	113.6	111.5
Playbill	41.8	51.0	75.4	89.5
Stereo Review	99.6	99.3	200.0	157.8
Video Magazine	69.5	73.0	155.8	159.3
Video Review	—	—	—	—
Total Group	327.1	337.3	702.7	672.5
% change		-3%		+4.5%
— Outdoor & sport —				
Alaska	40.0	52.9	63.8	86.2
The American Handgunner(6X)	—	—	41.0	35.0
American Hunter	16.4	16.6	37.3	38.6
American Rifleman	19.5	16.0	48.1	44.2
Backpacker (6X)	—	—	26.9	23.1
Bass Master (10X) A.	92.5	91.6	155.3	142.0
Bicycling (9X)	—	48.4	69.6	108.5
Ducks Unlimited (6X)	—	—	17.3	28.5
Field & Stream	93.8	94.3	169.0	154.4
Fins & Feathers A.	56.4	66.6	89.9	98.4
Fishing World	—	—	40.3	33.1
Florida Sportsman	163.0	155.1	312.6	265.1
Flying	48.5	36.5	87.0	70.7
Golf Digest	103.5	131.7	203.8	230.8
Golf Magazine	121.8	130.6	240.0	265.9
Gun Dog (6X)	—	—	33.5	25.5
Guns	25.5	28.0	54.0	57.0
Guns & Ammo	39.8	36.7	74.7	95.3
In-Fisherman (6X)	145.0	103.0	145.0	103.0
Muscle & Fitness	105.9	109.1	219.9	217.1
Outdoor Life	91.5	86.7	161.9	149.2
Outside Magazine	33.4	36.2	65.7	68.5
Petersen's Hunting	36.6	31.7	74.8	90.1
Runner	33.3	24.7	49.9	50.5
Runner's World (13X)	27.0	25.4	49.1	53.6
Saltwater (8X)	32.5	—	32.5	—
Salt Water Sportsman	104.9	119.0	288.4	280.4
Sierra (6X)	—	—	39.6	41.0
Shooting Times	43.7	42.0	76.3	95.5
Ski (8X) A.	78.8	50.8	162.2	166.5
Skiing (7X) A.	55.6	54.9	150.5	139.6
Skin Diver	104.3	90.9	203.4	183.2
Southern Outdoors (9X)	49.1	45.3	94.2	84.3
Sport	32.3	42.3	64.3	73.5

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. * All affiliated with Sunday Mag/Net, except Los Angeles Times Magazine and New York Times Magazine.

All figures represented in this chart are supplied by the magazines. Advertising Age makes no attempt to verify them and, therefore, is not responsible for inconsistencies or errors.

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February

	Current month 1987	Current month 1986	Year-to-date 1987	Year-to-date 1986
Sports Afield	92.8	75.8	225.8	149.0
Tennis	62.7	65.0	107.0	105.5
Western Outdoors (10X)	57.4	64.8	87.4	100.1
Wildfowl (6X)	9.4	9.5	9.4	9.5
Wing & Shot	—	—	12.4	—
World Tennis	25.6	20.5	39.3	38.2
Total Group	**2,042.5**	**2,002.5**	**4,123.0**	**4,000.5**
% change		+2.0%		+3.1%

— Photography —

American Photographer	31.3	36.7	55.4	71.0
Petersen's Photographic	24.1	23.4	46.1	43.3
Popular Photography	64.5	65.5	131.5	130.6
Total Group	**119.9**	**125.6**	**233.0**	**244.9**
% change		-4.5%		-4.8%

— Religious —

Charisma	45.8	55.0	851.5	818.1
Christian Herald (11X)	30.2	33.8	55.7	63.7
Christian Life	22.4	—	50.2	—
Christianity Today (18X)	61.0	71.3	93.5	121.3
Ministries Today (6X)	—	—	39.2	78.3
Moody Monthly (11X)	40.5	50.0	72.3	97.7
Our Sunday Visitor (52X)	9.6	10.8	22.9	23.0
Today's Christian Woman (6X)	—	—	31.4	29.0
Total Group	**209.5**	**221.0**	**1,216.7**	**1,231.1**
% change		-5.2%		-1.2%

— Science/electronic/mechanic —

Discover	45.2	29.1	94.0	62.2
Family Computing	51.9	32.8	107.0	88.7
Omni	57.8	58.2	105.3	103.3
Personal Computing	124.4	94.5	251.4	205.9
Popular Mechanics	90.5	90.6	164.2	172.1
Popular Science	75.6	75.9	134.7	144.1
Scientific American	41.4	32.2	71.7	65.6
Spectrum	74.0	77.3	149.3	183.5
Total Group	**560.8**	**490.5**	**1,077.6**	**1,025.4**
% change		+14.3%		+5.1%

— Woman/fashion/service —

Bride's Magazine (6X) A.	581.9	525.2	581.9	525.2
Cosmopolitan A.	190.4	182.8	343.3	337.4
Essence	75.1	81.4	130.4	148.6
Family Circle (17X) A.	88.3	125.2	162.5	226.7
Glamour	160.3	145.7	279.7	249.3
Good Housekeeping A.	123.6	158.6	205.9	261.9
Harper's Bazaar	120.3	128.3	189.7	186.1
Health	46.0	39.8	82.8	81.3
Ladies' Home Journal	102.0	116.4	167.2	201.8
Mademoiselle	108.4	97.7	185.8	149.5
McCall's	119.1	98.1	174.4	157.9
Military Lifestyle	50.1	36.3	94.3	93.8
Modern Bride (6X)	575.0	499.8	575.0	499.8
Ms.	28.5	31.2	76.2	73.7
New Woman	75.0	59.8	131.8	107.5
Parents Magazine A.	89.6	80.1	153.4	144.6
Redbook	95.0	91.4	166.0	162.7
Self	96.6	96.1	154.0	153.1
Seventeen	86.3	79.7	161.6	141.6
Shape	68.3	65.4	119.8	125.4
Soap Opera Digest (26X)	20.9	15.4	32.5	38.3
'Teen Magazine	49.0	38.0	81.7	63.8
True Story A.	55.9	60.0	88.3	94.6
Vogue	300.2	273.4	418.7	400.1
W Magazine	176.8	160.9	248.2	223.9
Woman (9X)	30.0	24.0	30.0	24.0
Weight Watchers	31.5	30.9	64.8	61.6
Woman's Day (16X) A.	117.9	82.4	211.1	189.3
Working Mother	70.8	67.8	134.2	120.4
Working Woman	74.0	81.1	156.3	164.4
Total Group	**3,806.8**	**3,572.9**	**5,601.5**	**5,408.2**
% change		+6.5%		+3.6%

— Youth —

Boys' Life	13.8	14.3	26.5	28.6
Campus Life (10X)	35.1	31.6	76.2	88.4
Total Group	**48.9**	**45.9**	**102.7**	**117.0**
% change		+6.6%		-12.3%

January

	Current month 1987	Current month 1986	Year-to-date 1987	Year-to-date 1986

— Business/national —

Barron's	157.2	148.5	157.2	148.5
Black Enterprise	42.0	56.6	42.0	56.6
Business Week (52X) A.	202.1	199.0	202.1	199.0
Financial World (26X)	57.5	40.9	57.5	40.9
Forbes (26X)	195.7	211.5	195.7	211.5
Fortune (26X)	136.1	128.5	136.1	128.5
Frequent Flyer	52.5	48.6	52.5	48.6
Futures	42.0	43.5	42.0	43.5
High Technology	14.4	19.4	14.4	19.4
Inc. Magazine A.	57.8	69.1	57.8	69.1
Industry Week (25X) A.	57.0	58.1	57.0	58.1
Nation's Business A.	31.9	40.1	31.9	40.1
Savvy	33.7	25.8	33.7	25.8
Venture	78.0	49.4	78.0	49.4
Total Group	**1,157.8**	**1,139.0**	**1,157.8**	**1,139.0**
% change		+1.7%		+1.7%

— Business/regional —

Advantage-Nashville's Bus. Monthly	52.0	46.0	52.0	46.0
Arizona Bus. Gazette (52X)	31.2	21.9	31.2	21.9
Austin Bus. Journal(52X)	25.0	33.3	25.0	33.3
Baltimore Bus. Journal	91.2	50.0	91.2	50.0
Boston Bus. Journal (52X)	102.7	112.5	102.7	112.5
Business Atlanta	49.0	49.7	49.0	49.7
Business First of Buffalo	47.5	45.0	47.5	45.0
Business First of Columbus	58.1	65.3	58.1	65.3
Business Journal-Milwaukee	81.3	70.5	81.3	70.5
Business Journal-Sacramento	68.7	36.4	68.7	36.4
Business North Carolina	30.2	33.5	30.2	33.5
Cincinnati Business Courier	96.8	51.9	96.8	51.9
Corporate Report Kansas City	18.7	38.5	18.7	38.5
Corporate Report Minnesota	71.0	70.0	71.0	70.0
Crain's Chicago Bus. (52X)	109.7	114.5	109.7	114.5
Crain's Cleveland Bus. (52X)	34.6	42.8	34.6	42.8
Crain's New York Bus. (52X)	17.7	23.4	17.7	23.4
Florida Trend (13X)	96.1	80.5	96.1	80.5
Georgia Trend	85.1	72.0	85.1	72.0
Grand Rapids Bus. Journal	37.3	22.9	37.3	22.9
Hawaii Business	43.0	35.0	43.0	35.0
Indianapolis Bus. Journal (52X)	115.8	117.6	115.8	117.6
Intercorp-Connecticut (26X)	73.5	61.5	73.5	61.5
Kansas City Bus. Journal	85.2	100.2	85.2	100.2
Los Angeles Bus. Journal	39.4	34.1	39.4	34.1
Manhattan Inc.	66.9	57.7	66.9	57.7
New England Bus. (20X) A.	37.3	47.9	37.3	47.9
New Orleans City Business	34.4	47.0	34.4	47.0
Pacific Bus. News (52X)	82.4	93.6	82.4	93.6
Philadelphia Bus. Journal (52X)	113.9	99.1	113.9	99.1
Regardie's/Washington	88.8	87.5	88.8	87.5
South Florida Bus. Journal	71.4	98.8	71.4	98.8
St. Louis Bus. Journal (52X)	93.4	99.5	93.4	99.5
Texas Business	30.3	48.1	30.3	48.1
Total Group	**2,179.4**	**2,108.2**	**2,179.4**	**2,108.2**
% change		+3.4%		+3.4%

— National Sunday magazines —

Parade (52X)	48.7	46.8	48.7	46.8
USA Weekend (52X)	38.2	51.3	38.2	51.3
Total Group	**86.9**	**98.1**	**86.9**	**98.1**
% change		-11.4%		-11.4%

— Newspaper Sunday magazines —

Boston Globe	156.8	153.0	156.8	153.0
Chicago Tribune	73.1	44.5	73.1	44.5
Cleveland Plain Dealer	25.6	16.5	25.6	16.5
Columbus Dispatch	27.8	20.6	27.8	20.6
Detroit News	50.0	49.0	50.0	49.0
L.A. Times	42.3	27.3	42.3	27.3
Louisville Courier-Journal	43.0	54.8	43.0	54.8
New York Times Magazine	57.2	41.7	57.2	41.7
Philadelphia Inquirer	33.0	37.0	33.0	37.0
San Francisco Image	28.1	42.3	28.1	42.3
Toledo Blade Magazine	23.1	26.1	23.1	26.1
Washington Post	93.2	61.9	93.2	61.9
Total Group	**653.2**	**574.7**	**653.2**	**574.7**
% change		+13.7%		+13.7%

— Weeklies/biweeklies —

The Advocate (26X)	121.0	121.2	121.0	121.2
Army Times Military Group:				
Air Force Times (52X)	136.5	127.0	136.5	127.0
Army Times (52X)	133.7	118.0	133.7	118.0
Navy Times (52X)	146.5	138.4	146.5	138.4
The Blood-Horse (52X)	444.5	534.7	444.5	534.7
Capper's Weekly (17X)	46.2	31.5	46.2	31.5
Commonweal (22X)	9.5	10.0	9.5	10.0
Golf World (43X)	87.3	80.8	87.3	80.8
Grit (52X) A.	44.6	24.3	44.6	24.3
Infoworld (52X)	152.0	111.0	152.0	111.0
National Journal (50X)	56.3	54.3	56.3	54.3
National Review (25X)	21.5	18.4	21.5	18.4
New Republic (48X)	25.7	24.6	25.7	24.6
New York Magazine (50X)	135.8	127.1	135.8	127.1
New Yorker	130.6	132.8	130.6	132.8
Newsweek (52X) a.	133.7	147.4	133.7	147.4
People (52X)	192.2	194.7	192.2	194.7
Rolling Stone (25X)	64.9	51.5	64.9	51.5
Sporting News (52X)	41.8	34.1	41.8	34.1
Sports Illustrated (52X) A.	144.6	156.7	144.6	156.7
Time (52X) A.	137.6	166.9	137.6	166.9
TV Guide (52X) A.	344.3	315.0	344.3	315.0
TV Update (52X) C.	2,184.0	2,089.0	2,184.0	2,089.0
Us Magazine (26X)	20.5	24.0	20.5	24.0
U.S. News & World Report (52X) A.	77.0	87.5	77.0	87.5
Total Group	**5,032.4**	**4,920.8**	**5,032.4**	**4,920.8**
% change		+2.3%		+2.3%

— Foreign —

Business Week Int'l (52X)	64.6	70.3	64.6	70.3
De Armas Publications:				
Geomundo:				
Central America	4.0	2.0	4.0	2.0
Chile	4.0	2.0	4.0	2.0
Colombia	8.0	5.0	8.0	5.0
Ecuador	4.0	2.0	4.0	2.0
Mexico	5.5	3.5	5.5	3.5
Peru	3.0	1.0	3.0	1.0
Puerto Rico	3.0	1.0	3.0	1.0
U.S.	2.7	5.7	2.7	5.7
Venezuela	8.0	6.0	8.0	6.0
Hombre De Mundo:				
Central America	3.0	4.0	3.0	4.0
Chile	3.0	2.0	3.0	2.0
Colombia	4.5	7.5	4.5	7.5
Ecuador	2.0	4.0	2.0	4.0
Mexico	5.0	1.5	5.0	1.5
Peru	1.0	2.0	1.0	2.0
Puerto Rico	1.0	2.0	1.0	2.0
U.S.	8.0	6.7	8.0	6.7
Venezuela	9.0	9.0	9.0	9.0
Ideas Para Su Hogar:				
Colombia	5.0	6.7	5.0	6.7
Mexico	0.5	1.0	0.5	1.0
Peru	4.0	1.0	4.0	1.0
U.S.	5.0	3.0	5.0	3.0
Venezuela	3.0	5.5	3.0	5.5
Mecanica Popular:				
Argentina	2.8	1.0	2.8	1.0
Central America	8.2	6.5	8.2	6.5
Chile	2.2	2.3	2.2	2.3
Colombia	14.7	13.8	14.7	13.8
Mexico	11.5	6.2	11.5	6.2
Peru	6.7	4.8	6.7	4.8
Puerto Rico	6.7	5.5	6.7	5.5
Venezuela	8.7	7.8	8.7	7.8
Vanidades Continental:				
Central America	2.7	3.2	2.7	3.2
Chile	1.7	0.3	1.7	0.3
Colombia	20.0	14.0	20.0	14.0
Ecuador	3.0	5.0	3.0	5.0
Mexico	28.2	24.3	28.2	24.3
Peru	10.8	8.3	10.8	8.3
Puerto Rico	13.2	13.2	13.2	13.2
U.S.	29.5	23.8	29.5	23.8
Venezuela	15.7	16.3	15.7	16.3
Hearst International				
Buenhogar:				
Central America		2.0		2.0
Chile	1.0	1.0	1.0	1.0
Colombia	15.5	15.2	15.5	15.2
Ecuador	5.0	6.0	5.0	6.0
Mexico	13.0	9.8	13.0	9.8
Peru	10.0	5.0	10.0	5.0
Puerto Rico	1.2	7.5	1.2	7.5
U.S.	15.5	13.2	15.5	13.2
Venezuela	10.5	13.3	10.5	13.3
Cosmopolitan en Espanol:				
Central America	1.0	0.3	1.0	0.3
Colombia	11.5	3.3	11.5	3.3
Mexico	12.2	6.8	12.2	6.8
Puerto Rico	7.0	4.5	7.0	4.5
U.S.(Spanish language)	13.2	13.2	13.2	13.2
Venezuela	—	4.3	—	4.3
Cosmopolitan Foreign				
Australia	59.2	52.5	59.2	52.5
Brazil	86.0	51.3	86.0	51.3
China	33.2	30.3	33.2	30.3
France	33.2	37.5	33.2	37.5
Germany	52.7	54.2	52.7	54.2
Great Britain	55.0	51.0	55.0	51.0
Greece	43.0	43.0	43.0	43.0
Holland	28.0	24.0	28.0	24.0
Italy	23.5	18.3	23.5	18.3
Japan	47.0	90.5	47.0	90.5
South Africa	54.0	77.0	54.0	77.0
Good Housekeeping				
Australia	18.8	25.5	18.8	25.5
Great Britain	87.5	86.7	87.5	86.7
International Communications:				
African Business	11.0	13.4	11.0	13.4
The Middle East	11.0	12.2	11.0	12.2
New African	9.5	14.9	9.5	14.9
International Management:				
Europe	18.3	24.8	18.3	24.8
Middle East	4.5	8.3	4.5	8.3
Johnston International:				
Alam Attijarat	17.7	21.3	17.7	21.3
Latin America Finance (6X)	14.2	19.2	14.2	19.2
Newsweek International A.:				
Atlantic (52X)	48.1	48.9	48.1	48.9
Latin America (52X)	17.2	20.9	17.2	20.9
Pacific (52X)	35.7	42.1	35.7	42.1
Reader's Digest:				
Arabic	9.0	3.0	9.0	3.0
Asian	125.0	377.0	125.0	377.0
Australian	32.0	34.0	32.0	34.0
Belgian-Flemish	15.0	33.5	15.0	33.5
Belgian-French	14.5	27.5	14.5	27.5
British	34.9	42.3	34.9	42.3
Chinese B.	84.0	130.5	84.0	130.5
Danish	19.0	22.5	19.0	22.5
Dutch	26.0	28.0	26.0	28.0
Finnish	8.0	6.0	8.0	6.0
French	15.3	8.5	15.3	8.5
German	65.3	45.3	65.3	45.3
Indian-English	70.0	74.5	70.0	74.5
Indian-Hindi	17.0	6.0	17.0	6.0
Italian	29.0	23.5	29.0	23.5
Korean	24.0	28.8	24.0	28.8
Latin American:				
Argentina	9.0	8.0	9.0	8.0
Brazil	—	6.0	—	6.0
Central American	5.0	3.0	5.0	3.0
Chile	4.0	12.0	4.0	12.0
Colombia	20.0	20.0	20.0	20.0
Ecuador	4.0	5.0	4.0	5.0
Mexico	26.2	18.1	26.2	18.1
Peru	5.0	7.0	5.0	7.0
Puerto Rico	4.0	3.0	4.0	3.0
U.P.B.	3.0	5.0	3.0	5.0
U.S. Spanish	5.5	3.5	5.5	3.5
Venezuela	3.0	6.5	3.0	6.5
New Zealand	61.5	77.0	61.5	77.0
Norwegian	10.5	2.5	10.5	2.5
Portugal	28.5	58.0	28.5	58.0
South African	69.5	57.0	69.5	57.0
Swedish	4.0	13.0	4.0	13.0
Swiss-French	17.0	11.0	17.0	11.0
Swiss-German	18.0	22.0	18.0	22.0
Time International:				
Time-Asia	34.5	40.9	34.5	40.9
Time-Atlantic	33.5	35.7	33.5	35.7
Time-Canada	119.0	119.2	119.0	119.2
Time-Latin America	15.4	26.9	15.4	26.9
Visao (52X)	97.0	146.3	97.0	146.3
Vision/Latin America (26X) A.	12.4	7.9	12.4	7.9
Total Group	**2,473.1**	**2,897.1**	**2,473.1**	**2,897.1**
% change		-14.6%		-14.6%